



HHAEExchange+ Mobile App  
Caregiver Guide  
EVV

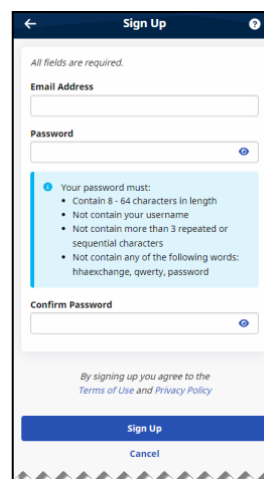
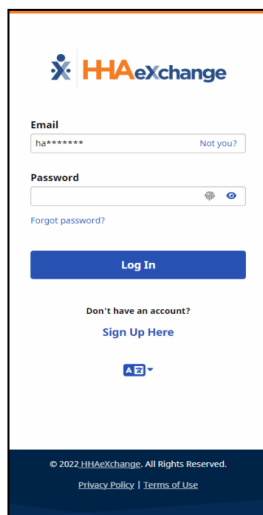
## Sign Up Here

**Caution:** Be sure to download the **HHAExchange+** app, not the older HHAExchange mobile app.

**Note:** The first time you open the Mobile App, you must select your preferred language and tap **Apply**.

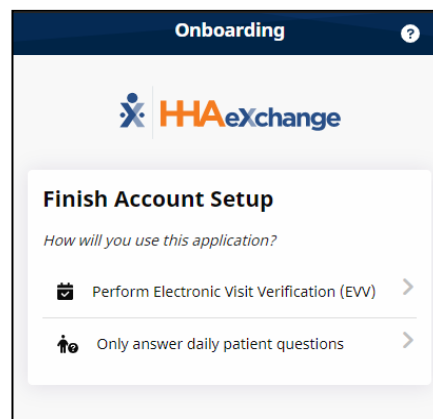
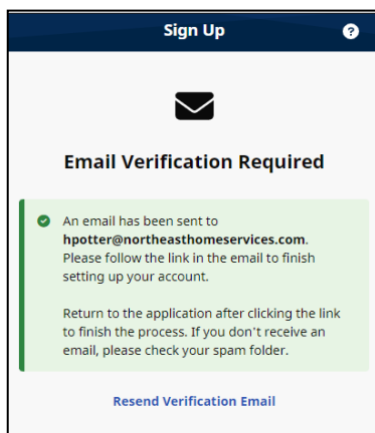
To sign up for and log in to the Mobile App,

1. From the *Login Page*, tap **Sign Up Here**.
2. On the *Sign-Up* page, type your **Email Address** and a strong **Password**.
3. Type your password again in **Confirm Password**, and then tap **Sign Up**.



4. On the *Email Verification Required* page, follow the instructions to open the verification email sent to your email address by HHAExchange, and then follow the instructions in the email to proceed with on-boarding.
- Note:** Check your spam/junk folder for email verification.

5. When the *Finish Account Setup* page is displayed, answer the question: "How will you use this application?" Tap **Perform Electronic Visit Verification (EVV)**.

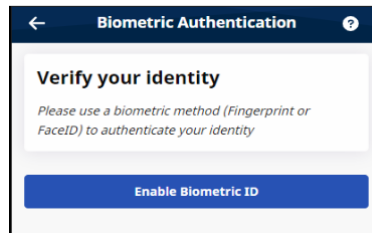
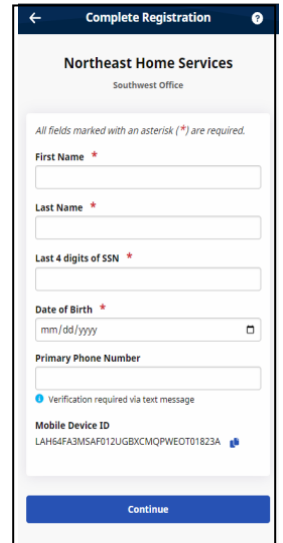
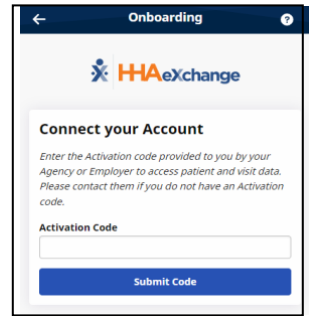


When you tap **Perform Electronic Visit Verification (EVV)**...

- a. On the *Connect your Account* page, type the **Activation Code** provided by the Agency (valid for 7 days), and tap **Submit Code**.
- b. On the *Complete Registration* page, complete all required fields (marked with \*) and then tap **Continue**.

**Note:** You must respond to an email verification of your Primary Phone Number before you can continue.

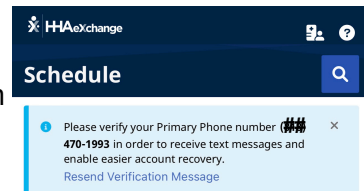
- c. If you would like to use Two-Factor Authentication, the *Biometric Authentication* page is displayed, tap the method you will use to verify your identity. If you tap **Use your fingerprint**, when prompted, place your identifying finger on your phone's fingerprint sensor. If you tap **Use facial recognition**, when prompted, orient your front-facing camera toward your face.



**Biometric Authentication**

- d. If the *Third-Party Terms* page is displayed, read the terms and acknowledge them by tapping **Accept Terms**.

**Note:** You must log in at least one time with Email and Password before using Biometric Authentication.



## Log In

To log in to the Mobile App,

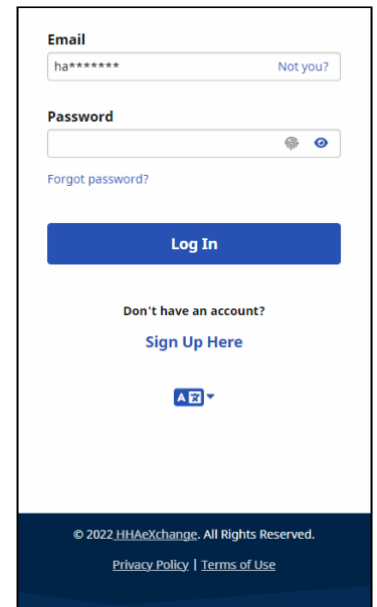
On the *Log In Page*, type your valid **Email Address** and **Password**, and then tap **Log In**. If prompted to do so, select your Agency/Employer.

You are logged in, and the *Schedule* page is displayed.

**Tip:** Tap **Not you?** in **Email** to enter a different Email Address.

**Tip:** To see the characters entered in **Password**, tap the eye icon in the **Password** field.

**Note:** You can tap an enabled fingerprint icon in the **Password** field to use a Biometric Log In (Finger- print or Facial ID).



## Biometric Log In

You can log in with *Fingerprint Authentication* or *Facial Recognition* if the capability is enabled on your phone.

For Biometric Log In to be available, you must have logged into the Mobile App using **Email** and **Password** at least one time. After that, you can tap the fingerprint icon at the right of the **Password** field to access your phone's fingerprint authentication or facial recognition biometric page.

**Note:** If the Agency/Employer requires *Two Factor Authentication*, you must also provide a **Password** on the *Log In* page before tapping the fingerprint icon.

After providing a matching fingerprint or facial scan, you are allowed access to the Mobile App.

**Note:** If you change or reset your password, the Biometric Log In option is reset. You must log into the Mobile App using **Email** and **Password** and log out at least one time before the Biometric Log In option becomes available again.

## Clocking In & Out: Scheduled Visit

### To Clock In for a Scheduled Visit:

1. From the *Schedule* page, select the patient visit to expand Visit Details.

From the Visit Details, you can view:

**Schedule Time** – Scheduled Start Time and End Time of Visit.

**Visit Type** - Skilled or Unskilled

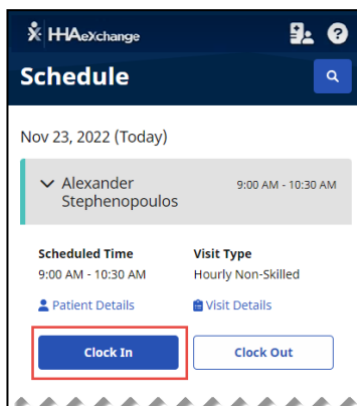
**Patient Details** - Patient Name, assigned office, Phone Numbers, Addresses

**Visit Details** - [Add Note](#)

**Note:** If the patient visit is not on the Schedule page, tap **+New Unscheduled Visit** to create an **Unscheduled Visit**.

If you don't see a particular Scheduled Visit, tap the **Search** icon (magnifying glass) at the top of the page to search for a Shift by **Patient Name**, **Date Range**, and **Visit Type**.

2. From the Visit Details, tap **Clock In**.



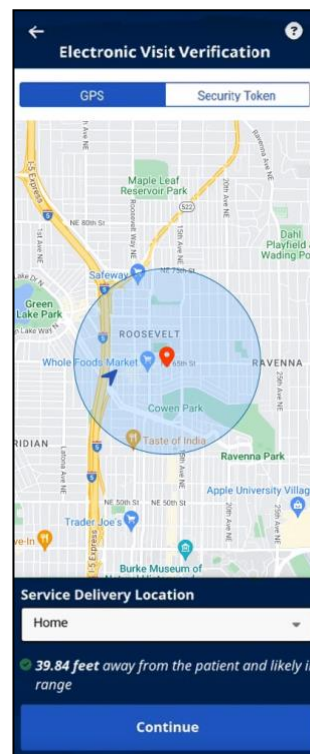
Scheduled Visit Details

3. On the Electronic Visit Verification page, select the **Service Delivery Location**

**Note:** You **MUST** allow the app access to your location.

**Important!** If your range is beyond 250 ft and you are in the clients home, notify your supervisor or EVV Coordinator.

4. When you are finished, tap **Continue**.



### To Clock Out for a Scheduled Visit:

1. From the *Schedule* page, select the patient visit to expand Visit Details.
2. From the Visit Details, tap **Clock Out**

**Note:** If you forget to clock out and have to clock out at a later time, please do so and then enter a note with the correct time you should have clocked in or out. This should not be a common practice but will avoid payment issues.

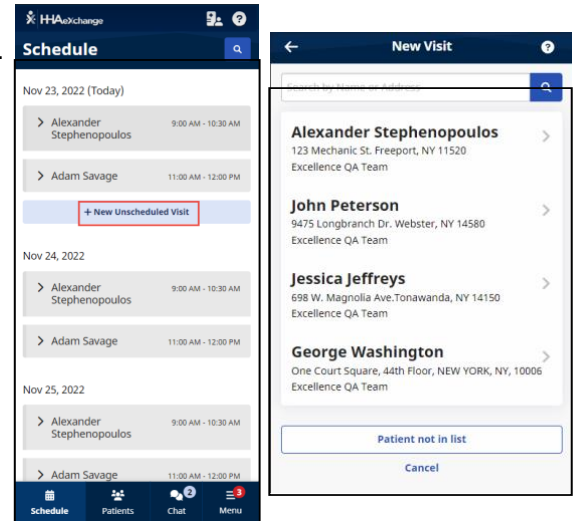
## Unscheduled Visit

You can select **+New Unscheduled Visit** from the *Schedule* page to create a new *Unscheduled Visit*.

**Note:** A New (Unscheduled) Visit can also be created from the [Patients](#) Page.

To create an Unscheduled Visit from the *Schedule* page:

1. Tap **+New Unscheduled Visit**.
2. On the *New Visit* page, **select the patient**, or use the Search function at the top of the page to look up and select a Patient.
3. Proceed with the clock in and out instructed previously mentioned.



## Offline Mode

You can use the Mobile App when there is no internet connectivity or if your phone is disconnected. When the internet connection is restored, the Mobile App automatically synchronizes with HHAX.

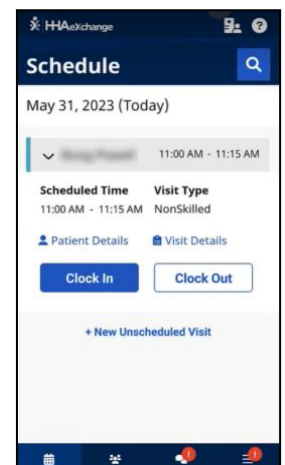
We recommend logging into the app while there is internet connectivity to download your visits prior to being on offline mode.

You will be able to view your existing Clients, Shifts, and view Help. Unavailable features in the Navigation Bar are marked with a white exclamation mark in a red circle.

To use Offline Mode:

1. Log In with the last used Email and Password
2. The app will notify you if you are in offline mode. Hit Close
3. Clock in and out as previously instructed.

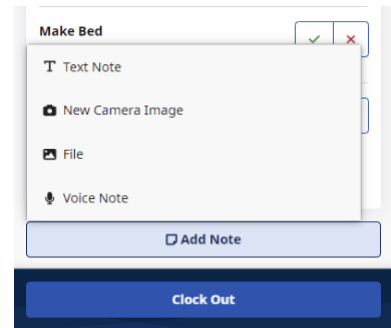
**Note:** Offline data will only be stored for 4 days, if you are approaching the 4<sup>th</sup> day please find the nearest facility that offers free-wifi to sync your visits with the agency.



## Visit Notes

Follow these steps to enter a Visit Note.

1. From the bottom of the Visit Details page, tap **Add Note**.
2. Select the Note Type
  - **Text Note**- Up to 1000 characters.
  - **New Camera Image**- Opens the phone's camera, allowing you to take a photo and add a description up to 500 characters.
  - **File** - Opens a Search page where you can browse the phone for a file to attach.
  - **Voice Note** - Opens a recorder where you can record and save audio comments.
3. Obtain and attach the Note, and then tap **Save**.



From the Visit Details page:

- To view an attached note, tap it.
- To edit an attached note, tap the **Edit** icon (pencil).
- To delete an attached note, tap the **Delete** icon (trash can).

## Push Notifications

Push notifications allow you to be alerted that chat messages have been received when you are not logged into the Mobile App.

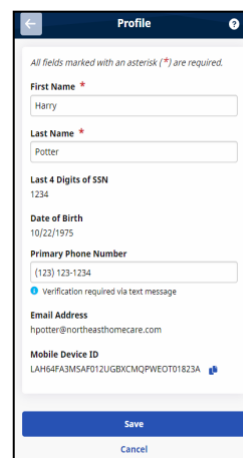
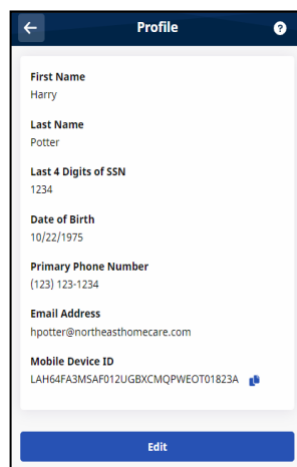
Tap the notification to open the Chat function.

## Profile

To edit your Profile information, tap **Profile** from the *Settings & Help* section of the *Menu*.

On the *Profile* page, tap **Edit**, make any changes, and then tap **Save**.

**Note:** A confirmation text is sent to your phone when the **Primary Phone Number** is added or changed. You must respond to the confirmation text in order to use the phone number to reset a password.



## Patients

The *Patients* page lists Clients that you have worked for in the past or are scheduled to work for in the future.

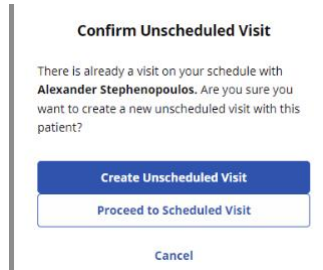
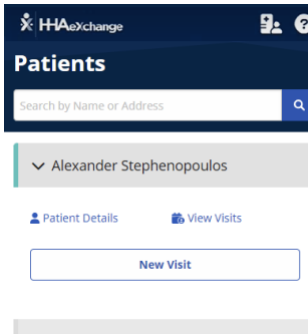
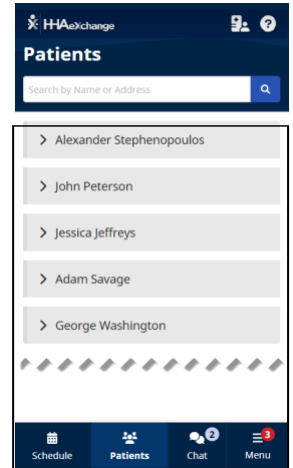
Select a listed client, or tap the **Search** icon to look up a Client you are authorized to visit.

To create a New Visit from the *Patients* page:

1. Select the client
2. Tap **New Visit**.

If a matching visit is already scheduled with the client, the Mobile App gives you the option of using that Scheduled Visit instead of this New Visit.

3. Clock in and out as previously instructed.

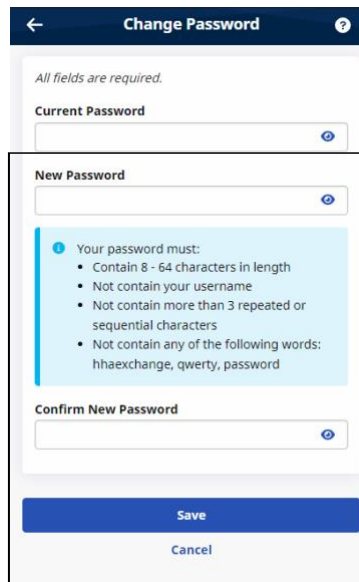




## Change Password

To change your Mobile App password,

1. From the *Menu*, tap **Change Password**.
2. On the *Change Password* page, type the **Current Password** and **New Password**.
3. Type the new password again in **Confirm New Password**.
4. When finished, tap **Save** to change the password and return to the *Menu*.

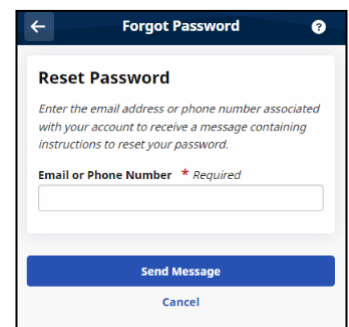


Change Password

## Reset Password

To reset your Mobile App password,

1. From the *Login* page, tap **Forgot Password?**
2. On the *Forgot Password* page, type the **Email** or validated **Phone Number** associated with the account. Tap **SendMessage**.
3. When the app confirms the message has been sent, tap **Done** to return to the *Login* page.
4. When you receive the reply message, follow its instructions to reset your password and login.



## Account Locked

After 10 failed login attempts, you are locked out of the Mobile App. A message advises you to use the **Forgot Password?** function (described above) to reset your password.

# Connections

The Connections page is used to switch between Agencies connected to you.

To change Connections,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, select from the list of **Connected Connections** and tap **Change Active Connection** to open the *Select a Connection* page.
3. Select the connection you need.

If the Connection you want is not shown on the *Connections* page, tap **Connect with a New Connection**. On the *Connect a New Connection* page, enter the Connection's **Activation Code** and tap **Submit Code**. Finish Connection Account Setup as explained in the Sign Up Here help topic.

To disconnect a Connection from your account,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (...) next to the name of the Connection you want to disconnect.
3. Tap **Disconnect Connection from your account**.
4. When prompted to confirm your actions, tap **Disconnect Connection**.

To set a Connection as the active connection for your account,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (...) next to the name of the Connection you want to set as the active connection.
3. Tap **Set as Active Connection**.

